

## Where My Asset/Records Are

Completion of this form or one like it can be of considerable assistance to those who must act for you in the event of an emergency or death. A copy should be provided for your spouse, other relative, your lawyer, or executor.

The Affairs of: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_  
 Address: \_\_\_\_\_ SS# \_\_\_/\_\_\_/\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Location Code:

- A. Safe Deposit Box \_\_\_\_\_ location
- B. Office \_\_\_\_\_ location
- C. Home \_\_\_\_\_ location
- D. Other \_\_\_\_\_ location

LIST LOCATION A, B, C, OR D

Mutual fund shares	___	Cemetery Plot deed	___
Bonds	___	Spouses will (original)	___
Tax shelter annuities	___	Spouses will (copy)	___
State Teacher Retirement	___	Spouses burial instructions	___
Other Annuity Contracts	___	Documents (children's guardian)	___
Income and Gift Tax Ret	___	Handwritten (special bequests)	___
Titles & Deeds (real estate & land)	___	Trust Agreements	___
Title Insurance	___	Life Insurance, group	___
Rental Property Records	___	Life Insurance, individual	___
Notes, Loans, Mortgages	___	Other death benefits	___
List of (stored & loaned valuable possessions)	___	Property & Casualty Insurance	___
Auto ownership records	___	Health Insurance Policy	___
Car Insurance Policy	___	Boat ownership records	___
Birth Certificates	___	Homeowners Insurance Policy	___
Citizenship Papers	___	Employment Contracts	___
My Adoption Papers	___	Partnership Agreements	___
Military Discharge Papers	___	List (checking & savings accounts)	___
Marriage Certificates	___	Bank Statements	___
Children's Birth Certificate	___	List of Credit Cards	___
Children's Adoption Papers	___	Certificates of Deposit	___
Divorce/separation papers	___	Savings Passbook	___
My Will (original)	___	Checkbooks	___
My Will (copy)	___	Record of Investment Securities	___
Power of Attorney	___	Brokerage Account Records	___
My Burial Instructions	___	Stock Certificates	___
		Other _____	___

Key people (not residing with you): Names, addresses, etc.

Relative \_\_\_\_\_

Lawyer \_\_\_\_\_

Accountant \_\_\_\_\_

Insurance Agent \_\_\_\_\_

Professional Associations \_\_\_\_\_